



Strategic Planning Guide for Membership

This document provides step-by-step instructions, examples and simple worksheets to help your local member association develop a successful working plan for membership in the upcoming year and beyond.

What is strategic planning?

The process by which leaders of an organization (including successful corporations and businesses) come together to:

- Envision the future
- Establish the goals
- Empower its membership to make decisions

What does strategic planning accomplish?

- Ensures that actions and decisions are based on shared values and beliefs
- Clarifies goals and strategies in a measurable way
- Establishes a level of accountability for members

Why does your Member Association need a strategic plan?

- To promote positive energy for the association
- To integrate members thinking toward a common purpose
- To establish a framework for action

When should work on the Member Association's Strategic Plan begin?

- As soon as possible, after an association-wide member survey has been tallied

Note: Your plan should be a 'living document' that is frequently referenced, and reviewed for updates as necessary, particularly after any leadership changes

Who should be involved in the strategic plan?

- Board of the member association (i.e., president, president-elect, secretary, treasurer; etc)
- Association staff and/or volunteer leadership
- Any interested association members
- WEF MA staff, as necessary

How should you begin the strategic planning process?

Before beginning the actual strategic plan, get an idea of what the upcoming year entails. By following the steps listed below, the planning committee will be able to see how much time will be available for local association events and activities.

1. Conduct a membership survey
2. Get a blank calendar that covers the entire year
3. Mark the dates for events planned by your local member association; or dates for prominent WEF events, like WEFTEC, or WEF Specialty Conference so that you are better able to plan promotions or a push for member engagement



Let's begin your strategic plan...

Step 1: Survey your local member association members

A fundamental part of the strategic plan uses feedback from your association members. For help with creating a survey, refer to the sample membership survey provided under the MA Resource Library.

Step 2: Conduct an Environmental Scan

An environmental scan is a way to look at things beyond the association's control — economic, technological, political, cultural, social, demographic and environmental issues. Think of this as “the big picture.” Take into consideration the community of the local member association and the region in which your association is located. **List the issues that are critical to your association.**

Example: The effect that 9/11 had on business, the economy, etc.

Step 3: Analyze the Situation

CONDUCT A SWOT ANALYSIS

A SWOT analysis is a way to look at the things in the local member association that can be controlled — the internal situation and conditions of the association.

Look at the member association in terms of the following:

Strengths – what your local MA does well

Weaknesses – what your local MA does not do well or does not have the resources for

Opportunities – what opportunities do, or will, exist

Threats – what threats are facing your local MA; how can these be turned into opportunities

Remember that every strength can become a weakness, every weakness a strength, every opportunity a threat and every threat an opportunity.

When conducting a SWOT analysis, you should ask the following questions in relation to your member association. The SWOT worksheet that follows will assist in the analysis.

- Who are the members of the local member association (i.e., professional classifications)?
- What are the capabilities and interests of the members?
- What are the member association's financial and technological resources?
- What products (i.e., programs, events and services) can the local association offer to members and the sector?
- What are the talents of the members and what time constraints do they have?
- What are the workloads and outside work obligations of the members?



Use this worksheet to conduct a SWOT analysis of the characteristics of your MA today

Strengths (what your member association does well)

Example: Our member association hosts a successful annual conference.

Weaknesses (what your member association may not do so well) Example: We don't currently onboard members.

Opportunities (what opportunities exist)

Example: We have strong industry representation in our area.

Threats (what threats or problems exist)

Example: We are an extremely small association.

Step 4: Set Priorities and Define Specifics

- What are the results of the membership survey and how can they be incorporated into the plan?
- What are the specific interests of the member association as defined by the membership survey results?
- What can the local member association offer to its members?

Step 5: Create a Mission Statement

The mission statement describes the purpose of the local member association. It clearly says what your association is about and what it does. It also provides a template for the decision making of your association.



You can ask your association:

- What function or purpose is being performed?
- Who are we serving by presenting this event or program?
- How will we be able to do this?
- Do we have enough people, time and/or funding?
- Does this further our purpose or what we do?

Example: WEF Mission Statement

As a global water sector leader, our mission is to connect water professionals; enrich the expertise of water professionals; increase the awareness of the impact and value of water; and provide a platform for water sector innovation.

Your Local Member Association's Mission Statement:

Step 6: Develop Alternatives/Brainstorm

Think of the many things your member association can accomplish. Don't limit yourself to the obvious! Once you have several ideas written down, take the best of them and begin to develop your plan.

Step 7: Make Decisions and Set Goals

As professionals, with diverse experience, you know that the decision making and goal-setting process requires looking at all options and deciding which ones meet the needs of the team/client/customer; etc. Now you can look at the details, define objectives, strategies and tactics, and find the best way to get the job done.

OBJECTIVES

Objectives are specific accomplishments you want to achieve within the year. For example, an objective might be to improve the relationship with national headquarters through enhanced collaboration on programs, to develop programs that support the information and/or technical needs of our members; etc. It's up to the Strategic Planning Committee. Always remember to refer back to the membership surveys as you go through this process. The membership survey helps serve as a constant 'check' that members' expressed needs are being addressed, not just what staff or volunteers feel is important, or what hot topic emerges in the moment.

STRATEGIES

Strategies are how the objectives are achieved.

- Specific time frame
- Resources needed
- Measurable attributes



TACTICS

Tactics are the actual plans for accomplishing the strategies. Choose people, define their jobs, determine their financial resources and give them deadlines and expectations.

Step 8: Budgeting for Activities found in the Strategic Plan

It's time to determine how the member association will fund its plan, based on estimated income and expenses. Use a spreadsheet to list the projected incomes and expenses so the committee can see what the association will be able to do with its funds.

Allocate Resources: Prepare a Work Plan, or Budget

Use a spreadsheet for this part; Microsoft Excel works well. You don't have to be an accountant, though it is advisable to seek the assistance of a qualified professional for complicated budgets or financial questions. Basic business principles must apply; for instance, you can't spend what you don't have.

List what anticipated income might be here. Some of the following might be included:

- Beginning operating funds from last year
- Membership dues
- Money from events/activities
- Donations (from local program sponsors; etc.)

Next, take a look at the type of expenses the local member association might have. Remember that anything your member association does should be referenced in the Strategic Plan. If it is not there, no money should be allocated without a revision to the Strategic Plan. This is done with the approval of your association board. For this exercise, list some expenses anticipated for your member association.

- Administrative costs
- Travel
- Printing
- Postage
- Hospitality
- Speaker's fees

Your treasurer should then have two columns, one for "Budget (Income)" and one for "Actual (Expense)."



Step 9: Strategic Plan Review – Is It Working?

Midway through the year, take a close look at the plan and evaluate how it is working for the member association.

- Are we accomplishing the objectives we set out in the strategic plan?
- Are we ahead of schedule or running behind?
- Are members' needs being served?
- Is the membership growing?
- Are we working with national headquarters or industry for programs, etc.?

Try to determine why things are happening as they are, both good and bad. Make notes on the progress to pass on to next year's committee. This allows the member association to grow in strength and success, as well as increase membership.